

AGI Infra Limited

Report Date: 30 Dec 2016

Key Stock Indicators

| | | | | | |
|------------------------|---------|--|------------|-------------------------------------|--------|
| BSE Ticker : | 539042 | CMP as on 23 Dec 2016-Rs/share : | 109.8 | Shares outstanding (mn) : | 10.2 |
| Bloomberg Ticker : | AGIN:IN | 52 week range up to 23 Dec 2016 (Rs)(H/L) : | 109.8/76.0 | Free Float (%) : | 27.5 |
| Face value per share : | 10.0 | Market Cap as on 23 Dec 2016 (Rs mn) : | 1,122 | Average daily volumes (12 months) : | 26,122 |
| Div.Yield (%) : | 0.0 | Enterprise Value as on 23 Dec 2016 (Rs mn) : | 1,493 | Beta : | 0.5 |

Result Summary - Half Yearly

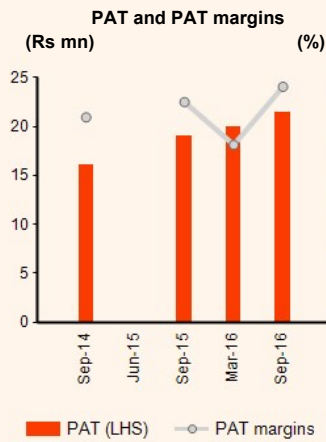
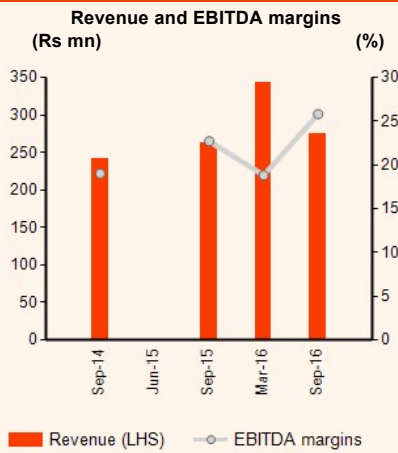
| Rs million | Sep-16 | Sep-15 | y-o-y (%) |
|---------------------------------|--------|--------|-----------|
| Net Sales | 276 | 262 | 5.3 |
| Raw material cost | 132 | 141 | -6.7 |
| Employee cost | 40 | 38 | 4.9 |
| Other expenses | 32 | 22 | 42.7 |
| EBITDA | 71 | 59 | 19.7 |
| EBITDA margins (%) | 25.8 | 22.7 | 310 bps |
| Depreciation | 10 | 6 | 57.7 |
| EBIT | 60 | 52 | 14.7 |
| Interest | 31 | 26 | 19.9 |
| Other Income | 2 | 1 | 24.5 |
| Extraordinary Income (Expenses) | - | - | - |
| PBT | 31 | 28 | 10.7 |
| Tax | 10 | 9 | 6.4 |
| PAT | 21 | 19 | 12.8 |
| PAT margins (%) | 7.7 | 7.2 | 50 bps |
| No. of shares (mn no.) | 10.2 | 10.2 | - |
| Earning per share (EPS) | 4.18 | 3.71 | 12.7 |

n.m. : Not meaningful
Source: Company | CRISIL Research

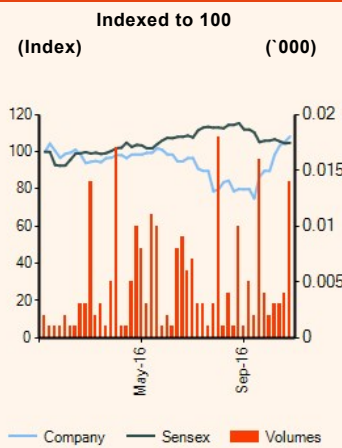
FINANCIAL UPDATE

- Revenue increased 5.3% y-o-y to Rs 276 mn in H1FY17 from Rs 262 mn in H1FY16.
- EBITDA margin expanded 310 bps y-o-y to 25.8% in H1FY17 from 22.7% in H1FY16, owing to decrease in raw material costs.
- PAT increased 12.8% y-o-y to Rs 21 mn in H1FY17 from Rs 19 mn in H1FY16.

Financial Performance Trends

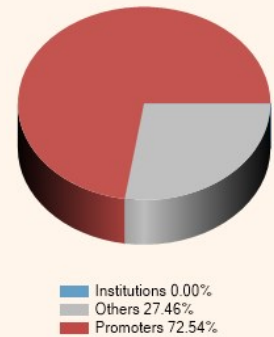


Share Price Chart



Shareholding Pattern

As on September 30, 2016



Source: Company | BSE | CRISIL Research

Analytical Contact

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